

■ Introduction

This economic development chapter provides an inventory and assessment of the economic engine driving Columbia County. This chapter takes a close look at the County's economic base, occupational trends, labor force and local and regional opportunities. In combination with information from other chapters of this Growth Management Plan, this examination will provide a base for economic development planning and policymaking within the County.

Although Columbia County is a growing community economically, it continues to remain primarily a bedroom community. As part of the Augusta-Aiken MSA (Columbia, Richmond and McDuffie Counties in Georgia and Aiken and Edgefield Counties in South Carolina), Columbia County residents enjoy cultural and employment benefits of being part of a metropolitan area that is approaching an overall population of a half a million people. Although home to several large corporations and company headquarters, the majority of businesses located in Columbia County are retail and service oriented, and their function is primarily to meet the immediate needs of its residential population. Its location in the Augusta-Aiken MSA area presents many regional opportunities. Excellent transportation infrastructure will allow continued accessibility to a multitude of markets and economic opportunities, while the development of several business and industrial parks, as well as accessory commercial and services industries in and around Columbia County, will continue to provide local economic growth in the future.

The main future economic development goal for the County is to encourage economic growth and nonresidential development in appropriate locations. The County would like to expand the tax base by creating opportunities for sustainable development, including targeting clean industry and tourism opportunities. The County is striving for an appropriate balance between residential quality of life and the need to provide employment opportunities and necessary services for its residents.

■ Setting—The County

Transportation accessibility is the engine that drives economic growth and change in Columbia County now, just as it has in the past. The County's location on I-20 midway between two state capitals, and connections to Interstates 75 and 85 in Atlanta, Charlotte, Raleigh and other large cities via Interstates 26, 77 and 95 allow businesses and residents convenient and efficient transportation connections. In addition, Bush Field Airport offers direct flights to Hartsfield International Airport. Other transportation related opportunities include 48 trucking terminals within the Columbia County area, rail service provided through CSX, and access to the international ports of Charleston and Savannah two and half-hours away.

As was apparent in the previous Growth Management Plan update, Columbia County continues to have rapid population growth. The County had the highest residential growth rate in the metro area during the 1990s, capturing 61.4% of metro area growth. The County continues to attract such growth due to its low cost of living, high quality of life, superb schools, relatively easy market access for products, low labor costs, cooperative local government, accelerated permit process, available sites, warm climate, and low taxes.

Columbia County contains two municipalities: Harlem and Grovetown, and is 91.8% unincorporated. The current population of 99,000 is projected to grow to 164,000 by the year 2020. Although Columbia County will continue to attract a large number of young families, household size is projected to decline, representing a growing single population and the maturing of families within the county. The proportion of the population over 65 years of age is projected to steadily increase from less than 6% to 8% by the year 2020.

One of the biggest draws in Columbia County is its primary school system and educated workforce. The Columbia County school system ranks in the top 10% nationally and is one of the top four in Georgia. In fact, Lakeside High School was ranked in the top 10 schools in the south by the Ohio based SchoolMatch, a company that helps relocations find the best schools for their children. The current graduation rate is 96.86% for public schools and 100% for private schools.

The Savannah River and Lake Thurmond (Clarks Hill Lake) provide recreational opportunities year round. With more than 1,200 miles of shoreline, Lake Thurmond is the largest man-made lake east of the Mississippi. The lake and the river provide opportunities for fishing, water skiing, boating and swimming.

Currently, over half of all sector employment within Columbia County is concentrated in the service and retail sectors. The majority of the County's commercial buildings are clustered in the Evans Town Center and Martinez areas. New retail and office development is projected in the William Few Parkway/Washington Road area and as part of the Bartram Trail Development on Columbia Road, with neighborhood commercial development located in identified nodal development areas. Industrial growth is projected to continue along the I-20 corridor.

Along with population growth, several economic indicators, such as educational attainment, mean income and mean housing value have shown increasing affluence in the community. Because of its location in the Augusta Metropolitan Area, excellent transportation access, affordable land prices, natural beauty, executive housing and amenities, Columbia County is an attractive community for executives and professionals.

■ The Region

Columbia County must be viewed within the regional context. During the past several decades, the Augusta Region experienced a boom in both population and job growth. An excellent transportation system, a positive housing market and continued corporate relocation and immigration will continue to fuel the region's growth to 2020. Because of Columbia County's status as a "bedroom" community, its proximity to major employment centers in Richmond and Aiken Counties, there has not been a great need to create employment opportunities within the county itself.

The region has a diversified, expanding base of industry that keeps the local economy growing. Services, manufacturing and retail trade are the leading employers in the area. The area has two natural assets—wood and kaolin. The area is one of the world's largest supplier of kaolin for ceramics and fillers. Forestry companies make wood products ranging from paper and pulpwood to fine furniture and flooring. Textile firms across the area manufacture apparel of all types. Medical supplies, services and technology are also very important to the area. Medical companies turn out pharmaceuticals, medical supplies and diagnostic equipment. Firms in emerging technologies, such as telecommunications and environmental remediation, are offered support through the CSRA's Southeast Technology Center.

As part of the half-million person August-metro area, Columbia County enjoys big-city sophistication and amenities—symphony, theater, opera and ballet companies, museums and galleries, and fine restaurants. Site-selection teams who have chosen Augusta repeatedly mention the favorable business climate and the cooperation of local officials as deciding factors.

Employment opportunities within the County are for the most part either small manufacturing/wholesale trade or construction jobs, or jobs related to retail/services that are geared primarily to the needs of the immediate population. According to 1990 census data only a little over 26% of residents actually worked in the County. Although the County will continue to actively promote and encourage nonresidential development in appropriate locations, it will nonetheless retain its commuter orientation.

■ Economic Base Inventory

Much of the following analysis uses the term “economic sector.” The federal government classifies local industries and businesses into the following nine major “sectors”:

- Agriculture, forestry, fishing & mining
- Construction;
- Manufacturing;
- Transportation, Communications, Utilities (TCU);
- Wholesale Trade;
- Retail Trade;
- Finance, Insurance, and Real Estate (FIRE);
- Services; and
- Public Administration (government).

According to the *1998 Georgia County Guide*, College of Agricultural and Environmental Sciences, the University of Georgia, as of 1996 there were 1,335 business located in Columbia County. Of these businesses, 34.9% were classified as service industries, 17.4% as retail establishments and 4.1% as manufacturing businesses.

■ Employment by Sector

Employment refers to the number of people employed by local businesses and industries, sole proprietors and those that are self-employed. This includes people living in surrounding areas coming to Columbia County to work, but does not include residents of Columbia County who commute to jobs outside of the County limits. The data does not determine if the workforce in the Columbia County area are also residents of Columbia County. Table E-1, Employment Trends by Sector, examines employment opportunities and trends in Columbia County from 1970 to 2020. As can be seen by this table, total employment has increased from 4,016 employees in 1970 to 32,444 employees in 2000. Total employment projected to the year 2020 is 74,424.

Table E-1

Total Employment by Sector, 1970 - 2020
Columbia County

Industry	1970	1975	1980	1985	1990	1995	2000	2005	2010	2015	2020
Total Employment	4,016	5,863	8,676	12,886	18,814	24,607	32,444	41,214	51,134	62,204	74,424
Agriculture, Forestry, and Fishing	178	269	375	314	259	214	172	151	86	43	-
Mining	1	21	1	34	36	55	73	95	120	148	178
Construction	415	598	972	1,504	2,304	2,605	3,442	4,244	5,128	6,094	7,142
Manufacturing	702	988	1,917	2,315	2,701	3,537	4,094	4,740	5,406	6,093	6,801
TCU	69	87	163	322	445	566	764	971	1,203	1,460	1,742
Wholesale Trade	160	170	206	367	513	632	861	1,103	1,380	1,692	2,040
Retail Trade	401	666	1,356	2,280	3,023	4,615	6,105	7,913	9,966	12,264	14,806
FIRE	268	721	808	1,306	1,669	2,144	2,627	3,164	3,744	4,368	5,035
Services	968	1,162	1,336	2,481	5,120	7,169	10,631	14,622	19,297	24,655	30,697
Public Administration	854	1,181	1,542	1,963	2,744	3,070	3,675	4,233	4,804	5,387	5,983

Source: 1970-95: Woods & Poole Economics. 2000-2020: COOPER-ROSS sv.

Table E-2, percent of Sector Employment 1990-2020, provides an analysis of the percentages of employment within each sector. From 1970 to 1990 the largest 4 sectors were services, public administration, retail and manufacturing. The only difference in sector employment over that 20-year period is that services and retail continue to capture a larger share of the total employment market. As can be seen in Table E-2, in 1990 Columbia County had 18,814 jobs. The 4 largest sectors in 1990 were: services at 27%, retail at 16%, public administration at 15% and manufacturing at 14%. The 2000 employment estimates show the number of jobs increased to 32,444, and a slightly changing picture on where those jobs are. In 2000 the largest employment sector are still services at 33% and retail at 19%. The public sector's share of overall employment fell from 15% to 11% of the total market, and manufacturing, with 4,094 jobs became the third largest sector with 13% of overall jobs.

While total employment over the past decade increased by 72%, both services and retail employment more than doubled, and manufacturing employment kept pace at 13%

Table E-2

Percent of Sector Employment 1990 to 2020
Columbia County

Industry	1990	%	2000	%	2010	%	2015	%	2020	%
Total Employment	18,814	100%	32,444	100%	51,134	100%	62,204	100%	74,424	100%
Agriculture, Forestry, and Fishing	259	1%	172	1%	86	0%	43	0%	0	0%
Mining	36	0%	73	0%	120	0%	148	0%	178	0%
Construction	2,304	12%	3,442	11%	5,128	10%	6,094	10%	7,142	10%
Manufacturing	2,701	14%	4,094	13%	5,406	11%	6,093	10%	6,801	9%
TCU	445	2%	764	2%	1,203	2%	1,460	2%	1,742	2%
Wholesale Trade	513	3%	861	3%	1,380	3%	1,692	3%	2,040	3%
Retail Trade	3,023	16%	6,105	19%	9,966	19%	12,264	20%	14,806	20%
FIRE	1,669	9%	2,627	8%	3,744	7%	4,368	7%	5,035	7%
Services	5,120	27%	10,631	33%	19,297	38%	24,655	40%	30,697	41%
Public Administration	2,744	15%	3,675	11%	4,804	9%	5,387	9%	5,983	8%

Source: 1990 Woods & Poole Economics. 2000-2020: COOPER-ROSS sv.

Employment in the county is expected to grow by 130% over the next 20 years, from 32,400 now to 74,400, an increase of 42,000 new jobs. Services and retail trade continue to be the top two largest sectors with an increasing share of the market, 41% and 20%, respectively. Construction employment will become the third largest sector with 7,142 jobs or 10% of the market, while manufacturing will fall to the fourth largest sector with 9% or 6,801 jobs.

Up to now, there has been less than 1 job for every household in the county (although there is, on average, more than one employed person in each household). This underlines Columbia County's historic role as a "bedroom" community to Augusta-Richmond County and the Savannah River Plant. Projections from 2000 forward, however, show an increasing jobs-to-household ration, suggesting a growing local employment base and a lessening reliance on jobs located outside of the county.

Table E-3

Comparison of Sector Employment, 1998
Columbia, Richmond and McDuffie Counties

Industry	2000 Columbia	1998 Richmond	1998 McDuffie
Agriculture, Forestry, Fishing	0.5%	0.3%	4.4%
Mining	0.2%	0.1%	0.0%
Construction	10.6%	5.2%	6.3%
Manufacturing	12.6%	12.0%	24.7%
TCU	2.4%	4.0%	2.3%
Wholesale Trade	2.7%	3.0%	1.7%
Retail Trade	18.8%	20.0%	24.5%
FIRE	8.1%	3.1%	3.2%
Services	32.8%	46.4%	25.9%
Public Administration	11.3%	5.9%	6.4%

Source: Columbia County 2000 employment estimates, COOPER-ROSS sv. McDuffie and Richmond Counties: Georgia Department of Labor, Area Labor Profile

Columbia, Richmond and McDuffie Counties

As part of the Metro Augusta area, Columbia County's transportation network allows residents convenient access to employment in Richmond and McDuffie Counties, among other choices. As a result of this mobility, it is assumed that residents have a wide variety of employment opportunities in and around the Augusta-Aiken MSA. As mentioned earlier in the chapter, the economic well being of the residents of Columbia County has more to do with the opportunities of the region than with the opportunities presented solely within the County. Companies located within the County provide a small portion of the overall employment opportunities that the residents of Columbia County enjoy. As demonstrated in Table E-3, Comparison of Sector Employment, Columbia, Richmond and McDuffie Counties have many of the same characteristics. The top 4 sectors in each county are Services, Retail, Public Administration and Manufacturing. Differences are in the distribution of the sectors in each county. For example, in Richmond County, the service and retail sectors claim over 66%, and therefore, employment in public administration is a smaller percentage of the whole. In McDuffie County services, retail and manufacturing employment all capture approximately the same percentage of jobs.

Columbia County and the State of Georgia

Table E-4 offers a comparison of the percent of jobs by sector in the County and the State of Georgia for the years 2000 through 2015. Projections for the year 2020 were not available for the State at this time. The most striking difference between the County and the State percentages are those that relate to wholesale trade and construction. Columbia County's Wholesale Trade sector accounts for only 2.7% of the market, while in the State Wholesale Trade consistently accounts for around 6.5% of total State employment. On the other hand, in Columbia County the construction sector accounted for around 10% of the local economy, while in the

Table E-4
Comparison of Sector Employment, 2000 - 2020
 Columbia County and State of Georgia

Industry	2000		2005		2015		2020	
	Columbia	Georgia	Columbia	Georgia	Columbia	Georgia	Columbia	Georgia
Total Employment	100.0%	100.0%	100.0%	100.0%	100.0%	99.3%	100.0%	n/a
Agriculture, Forestry, Fishing	0.5%	2.1%	0.2%	2.0%	0.1%	1.9%	0.0%	n/a
Mining	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	n/a
Construction	10.6%	5.3%	10.0%	5.2%	9.8%	5.1%	9.6%	n/a
Manufacturing	12.6%	14.5%	10.6%	14.1%	9.8%	13.5%	9.1%	n/a
TCU	2.4%	6.1%	2.4%	6.2%	2.3%	6.3%	2.3%	n/a
Wholesale Trade	2.7%	6.4%	2.7%	6.5%	2.7%	6.6%	2.7%	n/a
Retail Trade	18.8%	16.8%	19.5%	17.2%	19.7%	17.9%	19.9%	n/a
FiRE	8.1%	7.6%	7.3%	7.7%	7.0%	7.7%	6.8%	n/a
Services	32.8%	25.0%	37.7%	25.4%	39.6%	26.1%	41.2%	n/a
Public Administration	11.3%	15.3%	9.4%	14.8%	8.7%	14.0%	8.0%	n/a

Source: Department of Community Affairs, Planning Data, 1994 and Woods & Poole Economics 1999.
 Note: 2020 State Projections are not currently available.

State only 5% of sector employment was in construction. Both the State and the County show increases in the services and retail sectors over the next 15 years, although the County's overall percentages in these sectors are much greater than the State.

■ Major Development Trends and Unique Economic Opportunities

Below is a more detailed description of economic development opportunities by sector within the County and Metropolitan area.

Retail Trade and Services

Retail trade and service employment in Columbia County increased dramatically from 1990 to 2000. In 1990 retail trade and services comprised 43% of the market with 8,143 jobs. By 2000 the number of retail jobs had doubled to 16,736, comprising more than half of all jobs in the County. The majority of commercial activity is concentrated along Washington Road in Evans and Columbia Road and Bobby Jones Expressway in Martinez. Small scale and neighborhood commercial is located at major intersections, such as Pollards Corner in Appling. Because of the County's proximity to two major regional shopping areas, retail establishments found in the County are primarily intended to serve the residential population. As of yet, regional "big box" type centers have not located in Columbia County. The largest concentrations in the retail establishments are restaurants and food stores. In the future it is expected that retail and service centers will continue to concentrate in established commercial corridors in Martinez and Evans, in addition to newly created Neighborhood, Town and Commerce Centers as outlined in the land use and urban design chapters of this Growth Management Plan.

Columbia County's proximity to the Richmond County border presents larger scale retail opportunities, such as Augusta Exchange Shopping Center on Bobby Jones Expressway and Wheeler Road and the Augusta Mall. Shops within the Augusta Exchange Shopping Center include: Target, Sports Authority, Old Navy, CompUSA, Winn Dixie and several restaurants such as Cooker Bar and Grill, Don Pablo's and Chili's with more either under construction or in the planning stages. Health and business services make up the largest portion of service establishments.

Medical Industry and health services. The Augusta MSA has over 25,000 health care employees, including 1,500 doctors and 217 dentists, and 7 major hospitals. Georgia's Health Sciences University, The Medical College of Georgia, is a 540-bed teaching hospital with approximately 2,496 residents and students and 7,000 employees. Columbia County's proximity to the Augusta medical industry concentration will continue to attract spin off from this industry.

Tourism. Metro Augusta is a growing second-tier destination for mini-vacations, conventions and seminars. Area attractions include the Augusta Invitational Rowing Regatta, the National Barrel Horse Association World Championships, the Augusta Cutting Horse Futurity, Southern National Drag-Boat Racing and the crown jewel event, the week long Masters Tournament. Hospitality amenities within the county include the mild weather that makes golf essentially a year-round option, the Clarks Hill Recreation area and the Savannah Rapids Pavilion. A growing number of hotels and related facilities are being developed to take advantage of these opportunities. As of February 1999 there were 6 hotels located at the I-20 and Dyess Parkway Interchange. In addition to taking advantage of festivals and events located in the area (such as Masters' Week), several new golf clubs and recreational facilities are proposed. As part of this Plan, the county will study ways to take greater advantage of Clark's Hill Lake, such as the addition of a lodge or small convention area.

The retail and service sector will continue to dominate the Columbia County market in the future. In 2020 61% of the total job market will consist of retail and service oriented jobs. In the 20 year period from 2000 to 2020, the number of retail and service sector jobs will almost triple.

Construction

Construction employment in the Columbia County area increased from 2,304 jobs in 1990 to 3,442 jobs in 2000. Even though the actual number of jobs increased, the percentage of sector employment decreased from 12% of the total to 11%. The increase in employment in the Construction sector can be attributed in part to explosive residential growth in the County and the surrounding area. Small trade firms comprise the majority of construction related firms. Construction employment will see a slight decrease to 10% of the total employment in 2020.

Manufacturing and Wholesale Trade

Manufacturing and Wholesale Trade are reviewed in this section together because these sectors share many of the same characteristics such as land use, employee education and skill levels. Manufacturing employment in Columbia County went from 2,701 jobs in 1990 to 4,094 jobs in 2000, an actual increase of 1,393 jobs. In 2000, manufacturing employment accounted for 13% of total sector employment, a slightly lower percentage than in 1990. Manufacturing establishments made up 4.1% of the total number of establishments in Columbia County in 1996. Infrastructure improvements meeting specific needs (rail sidings, water pressure, utilities) and readily available industrial zoned land have made Columbia County attractive for clean industrial use.

Small and medium firms manufacturing a variety of products represent the manufacturing sector in Columbia County within industrial parks, such as the Columbia County Industrial Park in Evans and Horizon South Industrial Park near Grovetown (one mile south of I-20 at Exit 62), and along the I-20 corridor. Key manufacturers in Columbia County include:

John Deere	Georgia Iron Works
Club Car/Ingersoll Rand	Augusta Sportswear
Greenfield Industries, Inc.	Southern Beverage
ADP	Intertape Augusta
Graphixs Source	Pollard Lumber Col., Inc.
Ownes & Minor	United Medical Enterprises
Tracy-Luckey Co.	Martin Marietta
CSR Aggregates	

The market share of manufacturing employees will decline to 9% in 2020.

The percentage of Wholesale Trade employment in Columbia County has stayed the same at 3% since 1990. Wholesale trade share of the market will remain the same in 2020 accounting for approximately 7% of the total. Future industrial development will continue to locate primarily

along the I-20 corridor and within existing, expanded and new industrial parks. The County will continue its commitment to provide necessary infrastructure to attract clean industry.

Because of the County's location within the Augusta Metropolitan area, employment opportunities should be viewed in terms of opportunities available throughout the area. In fact, the majority of Columbia County residents commute to employment outside of the County. Above average manufacturing job growth and worker productivity pushed the Augusta-Aiken MSA to the top 11% of U.S. metropolitan areas of *Industry Week's* list of "World Class Communities."

Fort Gordon

Fort Gordon is the home of the U.S. Army Signal Corps, the largest communications/electronics training center in the world. As of February 1999, Fort Gordon employed approximately 4,715 civilian and 11,085 military personnel. The annual economic impact on the community is \$725 Million. Fort Gordon has been allocated more than \$60 million for new construction since FY95, with another \$80 million slated for future improvements. Fort Gordon is a model corporate neighbor and citizen, making valuable contributions to the community by supporting civic endeavors such as scouting, Adopt-a-School and D.A.R.E, among others.

■ Sector Earnings

Earnings represent the total of wages, salaries, and other earned income paid to persons working for the businesses or industries located in a given geographic area. In addition to comparison to the State, comparisons are made to Richmond and McDuffie Counties where available.

Table E-5

Average Weekly Wage by Sector--1990-1998**Columbia, Richmond and McDuffie Counties, Augusta-Aiken, SC MSA and State of Georgia**

Industry	1990		Total Earnings			
	Columbia	Georgia	1998			
			Columbia	Richmond	McDuffie	Georgia
All Sectors	\$335	\$425	\$440	\$519	\$414	\$592
Agriculture, Forestry, and Fishing	\$204	\$276	\$319	\$353	\$443	\$372
Mining	n/a	\$589	n/a	\$949	n/a	\$831
Construction	\$319	\$462	\$475	\$513	\$516	\$590
Manufacturing	\$462	\$602	\$657	\$741	\$463	\$653
TCU	\$378	\$378	\$609	\$597	\$646	\$834
Wholesale Trade	\$354	\$354	\$635	\$651	\$419	\$870
Retail Trade	\$231	\$231	\$272	\$282	\$292	\$867
FIRE	\$334	\$334	\$473	\$900	\$476	\$582
Services	\$272	\$272	\$377	\$521	\$408	\$356
Public Administration	\$415	\$415	\$497	\$535	\$456	\$622

Source: 1990: Department of Community Affairs Planning Data. 1998 Georgia Employment and Wages Averages, Georgia Department of Labor, Manufactured Goods (durable and non-durable) and State, Federal and Local employees averaged.

In 1990 the average weekly wage paid in Columbia County was \$335, considerably lower than the statewide average weekly pay of \$425 for the same period. In 1998, the latest date that information is available, average wages in Columbia County were \$440 as compared to Richmond County \$519, McDuffie County \$414 and the State wage of \$592. Except for McDuffie County, which is a more rural county, average weekly wages in Columbia County are below both Richmond and the State. Two things can possibly explain this lower weekly wage. First of all, a large portion of the Columbia County economy is based on the retail and service sectors, which have historically paid a lower wage. In fact, the retail and service sector average wage was among the three lowest with \$272 for retail and \$377 for services. A second possible explanation may be the types of employment opportunities found in the metropolitan area. Only a small percentage of County residents actually work in the County. Augusta has become very attractive as a relocation choice for many corporate and high tech industries, and therefore, a large concentration of management, professional and precision trades are located in Augusta.

In 1998 in Columbia County, the manufacturing, wholesale trade and TCU sectors had the largest average weekly pay at \$657, \$635 and \$609, respectively. Of these three sectors, the percentage of employment in each of these sectors was, 12% for manufacturing, 2.7% for wholesale trade and 2.7% for TCU. Except for mining in both Richmond and the State, top wage sectors were also paid in the manufacturing, wholesale trade and TCU sectors.

■ Sources of Personal Income

The sources of personal income are indicators of how a community receives its income. The State of Georgia Department of Community Affairs, with the assistance of Woods & Poole Economics, Inc., has developed categories and numbers for the analysis of sources of personal income. These five categories of personal income include the following:

1. **Wage and Salary** – Total income earned as compensation for working or rendering services;
2. **Other Labor Income** – Total employer contributions to private pension or worker's compensation funds;
3. **Proprietor's Income** – Proprietor's Income measured total profits earned from partnerships and sole proprietorships;
4. **Dividends-Investment-Rent-and Interest Payments, and Interest Income** – Total income from investments and rental property; and
5. **Transfer Payments** – Total income from payments by the government under many different programs that include Social Security, unemployment insurance, food stamps, veterans benefits, and countless others.

Associated with these figures is a Residence Adjustment category, which measures the net amount of personal income of residents of the county that is earned outside the county. When the number is positive, as in Columbia County, it means that the amount of income earned outside the county by residents of the county is greater than the amount of income earned in the county by nonresidents. This confirms the data trends seen in Table E-5.

Tables E-6 and E-7 show the source of personal income by type for Columbia County and the State of Georgia.

Table E-6
Sources of Personal Income by Type--1990-2000
 Columbia County and State of Georgia

	1990		1995		2000	
	Columbia	Georgia	Columbia	Georgia	Columbia	Georgia
Wage and Salary	43.7%	60.1%	42.6%	58.7%	42.3%	58.0%
Other Labor	4.3%	6.0%	4.5%	6.3%	4.4%	6.1%
Proprietor's Income	10.5%	6.6%	10.7%	6.9%	10.4%	6.6%
Dividends, Investment, Rent & Interest Payments	21.8%	14.5%	19.3%	13.3%	19.9%	14.3%
Transfer Payments	19.4%	12.5%	22.6%	14.5%	22.7%	14.8%
Residence Adjustment	103.9%	0.1%	95.0%	1.1%	91.1%	1.5%

Source: Georgia Department of Community Affairs, Data for Planning, Woods & Poole Economics, Inc., 1999

When comparing Columbia County to the State of Georgia, several differences become apparent. During the time period from 1990 to 2000 Columbia County's percentage of Wages and Salary is lower than the State. This can be attributed to the fact that Columbia County has a lower average income and salary than Georgia averages. Similar comparisons can be made in the "Other Labor" category.

While Wage and Salary were below state averages, Proprietors' Income and Dividends-Investment-Rent- and Interest Payments, were above the State averages. Considering the massive in-migration of population during in the mid-1990's, and the maturing of the County, these trends would suggest Columbia County is attracting a more mature and established population that has a greater percentage of self-employed persons, and long-term investments. Trends developed during the 1990s will continue to 2020.

Table E-7

Sources of Personal Income by Type--2000-2020

Columbia County and State of Georgia

	2005		2010		2015		2020	
	Columbia	Georgia	Columbia	Georgia	Columbia	Georgia	Columbia	Georgia
Wage and Salary	41.5%	56.9%	40.3%	55.6%	38.7%	54.1%	35.1%	55.1%
Other Labor	4.3%	5.9%	4.1%	5.7%	3.9%	5.5%	3.6%	5.9%
Proprietor's Income	10.1%	6.4%	9.8%	6.2%	9.4%	5.9%	4.9%	6.1%
Dividends, Investment, Rent & Interest Payments	20.7%	15.3%	21.7%	16.4%	22.9%	17.6%	26.5%	16.7%
Transfer Payments	23.1%	15.3%	23.9%	15.9%	24.9%	16.7%	29.9%	16.2%
Residence Adjustment	86.8%	1.7%	82.5%	1.9%	77.9%	1.9%	89.7%	0.2%

Source: Georgia Department of Community Affairs, Data for Planning, Woods & Pools Economics, Inc., 1999

Columbia County's residence adjustment was very high at 103.9% in 1990, although it has been notably decreasing. In 2020 the residential adjustment factor for the county was down to 89.7%. On the other hand, the State of Georgia's has been slowly rising. The residential adjustment represents the net amount of personal income of residents, but receiving the income outside the County. The resident who earns income in one county but lives in a different county would have that income counted under positive residential adjustment, and the county in which the resident works would have a negative adjustment. Although still very high in 2020, Columbia County's decreasing amount of personal income earned outside the county by residents compared to the amount of income earned in county by nonresidents shows how Columbia County is continuing to expand its job base. The State of Georgia's numbers are extremely close to 0%, which means almost all residents of Georgia earn their income in the state.

■ Inventory of Major Community-Level Economic Activities

The Columbia County area has seen a tremendous burst of economic activity in the last few years. Columbia County's transportation infrastructure and proximity to Interstate 20, excellent schools, weather, executive housing and suburban living so close to the hubbub of Augusta are some of the main attractions of the County.

The County has been proactive in the areas of planning and providing the necessary infrastructure to attract and sustain growth, and the County's overall commitment to integrating progressive urban design elements into the fabric of its development nodes. Because of its nearness to the Augusta metropolitan area and the County's transportation infrastructure, including I-20, Columbia County is a natural location for warehouse/distribution and clean industrial activities. Several large industrial and business parks are located in and adjacent to its borders.

While the County has experienced tremendous growth both in its residential population and employment opportunities, the County is challenged to provide an attractive business environment, while at the same time maintain a high quality living environment for its residents. As part of this Growth Management Plan, the County has identified a "Commerce Center" along the I-20 corridor. This Commerce Center is envisioned as a destination for expanded interstate trade opportunities that would accommodate retail, office, industrial and other commercial uses. This corridor is dependent upon access to the transportation network, technology and communications infrastructure. In addition, neighborhood and town centers also incorporate appropriate commercial land uses within village-type centers.

Development Authority

The Development Authority and the Chamber of Commerce are the primary vehicles to attract and provide available locational opportunities for industrial development. With the expansion of John Deere, the Development Authority Industrial Park, Horizon South, is currently at capacity. The Development Authority and the Chamber are currently identifying future sites for either expansion or the development of a new industrial park location.

■ Labor Force Analysis

This section involves the inventory and assessment of the employment of Columbia County's labor force. Work force characteristics include sex, amount of participation in the work force, and occupation and sector of the workers.

Columbia County Residents' Jobs

Table E-8 shows the percentages of total employment by occupational classifications for 1990 in Columbia County, the Columbia County Area,

Table E-8
Occupation of Residents
Columbia County, Columbia Area*, State of Georgia and Nation

Occupation	1990			
	Columbia	Columbia Area	Georgia	U.S.A.
Executive, administrative and managerial (not farm)	13.8%	10.5%	12.3%	12.3%
Professional and technical specialty	19.4%	15.6%	16.0%	17.8%
Sales	12.2%	16.1%	12.3%	11.8%
Clerical and administrative support	15.3%	14.1%	16.0%	16.3%
Private household services	n/a	n/a	0.5%	0.5%
Services (not private household)	9.9%	15.1%	11.5%	12.8%
Farming, fishing, forestry	1.5%	1.3%	2.2%	2.5%
Precision production, craft and repair	13.2%	12.7%	11.9%	11.3%
Equipment operation, assembly, inspection	4.9%	7.3%	8.5%	6.8%
Transportation equipment operation	3.1%	3.7%	4.6%	4.1%
Labor (not farm)	3.1%	3.1%	4.1%	3.9%

Source: Georgia Department of Labor, Area Labor Profile, 1990 Census. Columbia County Area includes Lincoln, McDuffie and Richmond Counties

Georgia and the Nation. This analysis looks at the occupations of the residents of the county, regardless of where they work in the region. The top three occupations of County residents were professional and technical specialty (19.4%), clerical and administrative support (15.3%), and executive, administrative and managerial (13.8%). These occupations account for almost 50% of the working residents of the County. The percentages of workers in occupational categories requiring above levels of education are higher than in the Columbia County area, State or Nation. This indicates that the majority of Columbia County residents are professional or "white-collar." This fact further emphasizes Columbia County's status as a bedroom community. However, continued development of industrial and commercial facilities within the county may have a future impact of where residents work.

Percentage breakdowns in Columbia County are similar to those found in the Columbia Area and the State of Georgia, with the exception of a higher executive, administrative and managerial percentage in Columbia County. The top three occupations in the Columbia County area and Georgia are professional and technical specialty, sales and clerical and administrative support. Nationally, the top three occupations are professional, clerical and services.

Several of the occupational categories showed Columbia County having a smaller portion of participation than the State and Nation. Private Household, Non-household Service and Equipment Operation, Assembly and Inspection categories are under represented in the County as compared to the State and Nation. While a large portion of the County's economy is focused in the service industry, this data would suggest that a large portion of these service sector employees do not reside in the County, but commute into the County for employment.

Labor Force Participation

Columbia County has an abundant and educated labor force. With one of the best primary school systems in the southeast, more than 81% of workers over 25 years of age have a high school diploma. Several area institutions provide advanced vocational and academic diplomas, such as Augusta Technical Institute, Augusta State University, Paine College and The Augusta Medical College of Georgia. In 1990, Columbia County had the highest proportion of persons age 25 or older with some college and/or college degrees (51%) in the four-county area of Richmond, McDuffie and Aiken SC. Technology is well woven into the public school system; every classroom is wired to the Internet through Peachnet, and through special programs at area universities, such as The Center for Advanced Technology and the Machine Tool Advanced Skills Technology Program.

Companies within Columbia County have an abundant workforce to choose from. With an average commute time of 20 to 40 minutes, people are willing to travel to a good job. The civilian workforce of the Augusta Metro area is 204,041. It is estimated that an additional 69,951 persons from the non-traditional labor force (students,

Table E-9

Labor Force Participation: 1980 and 1990 Columbia County, State of Georgia and Nation

	1980			1990		
	Columbia	Georgia	U.S.A.	Columbia	Georgia	U.S.A.
Total in Labor Force	67.3%	63.4%	62.0%	72.3%	67.9%	65.3%
Civilian Labor Force	62.0%	61.6%	61.0%	70.3%	66.4%	64.4%
Military Labor Force	5.2%	1.8%	1.0%	2.0%	1.5%	0.9%
Males in Labor Force	82.3%	75.8%	75.1%	81.5%	76.6%	74.4%
Females in Labor Force	53.1%	52.3%	49.9%	63.4%	59.9%	56.8%

Source: Georgia Department of Community Affairs, Data for Planning, 1994.

post secondary, military dependents, military retirees, and civilian retirees) are available for employment. The average age in the metro area is 31.

Table E-9 outlines labor force participation in Columbia County, State of Georgia and National figures for the census years 1980 and 1990.

The labor force figures are derived from the number of people 16 years and over living in Columbia County on April 1, 1980 and 1990. In 1980 labor force participation totaled 67.3% of the persons 16 years old and older. This is a little higher than both Georgia (63.4%) and the nation 62%. Both male (82.3%) and female (53.1%) participation was also higher than both the State and Nation. In 1990 labor force participation increased across the board. In Columbia County 72.3% of the persons 16 years old and older were part of the labor force. Labor force participation in the County continues to be a bit higher than both Georgia (67.9%) and the Nation (65.3%). Both male (81.5%) and female (63.4%) participation were also higher than both the State and Nation in 1990.

Table E-10
Labor Force Activity
Columbia County MSA, State of Georgia, USA

	Labor Force	1998 Annual Averages		
		Employed	Unemployed	Rate
Columbia	42,409	40,973	1,436	3.4%
Lincoln	3,619	3,372	247	6.8%
McDuffie	9,657	8,885	772	8.0%
Richmond	81,218	75,434	5,784	7.1%
Columbia Area	136,903	128,664	8,239	6.0%
Edgefield County, S.C.	9,290	8,870	420	4.5%
McCormick County, S.C.	4,240	3,880	360	8.5%
Georgia	4,020,811	3,851,722	169,089	4.2%
USA	137,673,000	131,463,000	6,210,000	4.5%

Source: Georgia Department of Labor, South Carolina Security Commission, Georgia Area Labor

Table E-11
Unemployment Rates
Gwinnett County, Georgia, and Nation

	Columbia	Georgia	U.S.A.
1985	4.0%	6.6%	7.2%
1986	3.7%	5.9%	7.0%
1987	4.2%	5.5%	6.2%
1988	4.0%	5.8%	5.5%
1989	3.9%	5.5%	5.3%
1990	3.1%	5.4%	5.4%
1991	3.3%	5.0%	6.6%
1992	4.4%	6.9%	7.4%
1993	4.9%	5.8%	6.8%
1994	3.9%	5.2%	7.1%
1995	3.9%	4.5%	5.6%
1996	3.9%	4.5%	n/a
1997	4.0%	4.5%	4.9%
1998	3.4%	4.2%	4.5%

Source: Georgia Department of Labor

Unemployment

Table E-10 shows a comparison of labor force participation and unemployment in the Columbia County area, Georgia and the Nation in 1998. As can be seen from this table, Columbia County had the lowest unemployment rate of all surrounding counties, with 3.4%. McDuffie County in Georgia, and McCormick County in South Carolina had the highest unemployment rates in the area, with 8.0% and 8.5% respectively.

Columbia County's unemployment rate has consistently been lower than the State's and the Nation in the past decade. Table E-11 presents unemployment figures for Columbia County, Georgia and the Nation from 1985 to the latest year available, 1998. Low unemployment within the County can be attributed in part to its location in the Augusta Metropolitan Area, and its diverse and abundant labor supply.

Table E-12

Commuting Patterns

Employed Residents of Columbia County

Place of Work	1980		1990	
	Number	% Total	Number	% Total
Richmond	10,920	69%	19,339	59%
Columbia	3,539	22%	8,705	26%
Aiken County, S.C.	909	6%	3,482	11%
Other	418	3%	1,478	4%
Total Reporting	15,786		33,004	
Total Out-Migration	12,247	78%	24,299	74%

Source: 1990 Census

■ Commuting Patterns

Trends in place of work and place of residence have seen a continual shift over the last 20 years in the State of Georgia. 1990 saw a shift of the percentage of residents working outside their county of residence increase over 1980. Increased mobility and transportation linkages have allowed an increasing number of residents to choose separate locations for their homes and offices. In 1990 only 26% of all workers 16 years and over worked within Columbia County. This is an increase from the 1980 percentage of 22%. The predominate

land use in Columbia County is residential, and is known as a “bedroom” community. Schools, not jobs are the main reason that people relocate to the County. Although there was a slight increase in the number of residents working within the County, 74% of the County residents still commute to neighboring counties for employment. Fifty-nine percent of the County work force travels to Richmond County to find employment and 11% are employed in Aiken County.

■ Local Economic Development Resources

Economic Development Agencies

Effective economic development programs are a group effort, involving not only local government and staff but also the cooperation of and resources available from other potential partners that have programs underway at various levels.

- **The CSRA Unified Development Council**

The CSRA UDC is a voluntary organization of concerned local and regional economic development groups, community service associations, and educational institutions whose purpose is to continuously improve the area’s economic structure and quality of life. The mission of the CSRA UDC is to provide planning, management and information services to its members, and to serve as a forum for addressing economic development. The CSRA UDC provides its members with such services as city/county/regional planning, state and federal grant applications, historic preservation, small business loans, data services and strategic planning. The CSRA UDC also sponsors educational seminars, industrial prospect tours, and strategic planning meetings.

- **Augusta Metro Chamber of Commerce**

The Augusta Metro Chamber of Commerce is a combined endeavor of Augusta-Richmond County, Columbia County and Burke County, Georgia. The Chamber’s main focus is to fos-

ter success among the businesses within the borders of Metro Augusta and to assist families and employees who are considering a move to Metro Augusta.

- **Education and Training Opportunities**

Augusta Technical Institute has opened the area's first high-tech "incubator," a facility that offers engineers, scientists, researchers and others free or low-cost technical support as well as office and research space. The Center for Advanced Technology (CADTEC) is the Consortium for Manufacturing Competitiveness demonstration site for the state of Georgia. The facility is a natural extension of Augusta Tech's QuickStart program, which enables area employers to tailor the school's curriculum to match the job skills they need in the local market. Augusta Tech's goal is to eliminate the need for weeks or months of on-the-job training by producing graduates who can support their employer's program from day one.

In addition to Augusta Tech, Swainsboro Technical Institute and an extension of the Georgia Institute of Technology provide technical training and support. Sandersville Regional Technical Institute is the newest institution. Skill specific training is offered through the CSRA Employment and Training Consortium, a public-private partnership.

- **Georgia Power Company, Economic Development Division**

Georgia Power is the oldest economic developer in Georgia, and has an Economic Development Division whose primary role is to attract businesses to the state. Georgia Power's primary local contact for economic development issues is generally with the Chamber of Commerce. Georgia Power's main emphasis is heavy marketing of Georgia in general and responding to client's site needs by maintaining a current site inventory database. Georgia Power will provide communities with technical advice on how to make changes necessary to attract business. The utility provides advice on downtown revitalization and solid waste disposal systems and various funding sources available to help meet the cost of such improvements. Georgia Power provides computer-enhanced imaging services to communities by modifying photographs of the community's downtown area. Georgia Power's Community Development Department also serves as a clearinghouse for communities to identify matching grants and other programs to plant trees, add fire hydrants or upgrade the water and sewer infrastructure. The sources of grant money may be state or federal agencies.

- **Georgia Department of Industry, Trade and Tourism**

The Georgia Department of Industry, Trade and Tourism (GITT) is a state-funded agency mandated to serve as the agent for all the cities and counties in the State of Georgia. The GITT's primary purpose is to assist potential businesses considering locating in Georgia by identifying an optimal location for their operational needs. The Georgia Department of Industry, Trade and Tourism also assists the movie industry in locating appropriate movie locations throughout the state. The identification of international markets for the export of Georgia goods and services is another duty of the GITT. In the event that a potential business is interested in the Columbia County area, GITT policy is to work with both the Chamber of Commerce and the local governmental entity. GITT has a working relationship with the utility companies, rail systems, banks, universities, and other agencies with resources to facilitate economic development. GITT maintains a substantial computer-based inventory of commercial and industrial sites throughout Georgia.

Resources—Programs and Tools

- **Ga. Business Expansion Support Act**

In 1994, the State passed legislation for tax credits against state income taxes to encourage economic development in Georgia. Some of the programs are targeted to specific industry groups (industry, tourism, and research and development) while others apply to all employers. For instance, tax credits for retraining employees and for providing childcare are available to all businesses.

Job tax credits and investment tax credits are available to the targeted industry groups at different levels, depending on the economic development relative needs of an area. Following is a brief description of potential programs.

Job Tax Credit. Applies to business or headquarters of a business engaged in manufacturing, warehousing and distribution, processing, tourism, and research and development industries. Does not include retail businesses.

Investment Tax Credit. Allows a corporation or person, which has operated an existing manufacturing facility in the state for the previous three years to obtain a credit against income tax liability.

Retraining Tax Credit. Any employer in Columbia County that provides retraining for employees is eligible for a tax credit equal to 25% of the costs of retraining per full-time student up to \$500.

Child Care Credit. Any employer in Columbia County that provides or sponsors childcare for employees is eligible for a tax credit of up to 50% of the direct cost of operation to the employer. The credit cannot exceed more than 50% of the taxpayer's total state income tax liability for that taxable year.

Manufacturing Machinery Sales Tax Exemption. Provides for exemption from the sales and use tax for manufacturing equipment

Primary Material Handling Sales Tax Exemption. Provides for exemption from the sales and use tax on purchases of primary material handling equipment which is used directly for the handling and movement of tangible personal property in a new or expanding warehouse or distribution facility when such new facility or expansion is worth \$10 million or more.

Electricity Exemption. Electricity purchased for the direct use in manufacturing a product is exempt from sales taxes when the total cost of the electricity makes up 50% or more of all the materials used in making the product. It allows full exemption on the sales tax and is available for new and existing firms.

- **Financing Mechanisms**

Community Improvement Districts. The Georgia Constitution provides for a special tax district called a Community Improvement District (CID). This type of district can be created only upon the petition of the property owners themselves, and is managed by a board that includes representatives of the property owners and the County. Under a CID, only nonresidential property is subject to the special tax, and the funds must be used only for certain public facilities, such as roads and water and sewer utilities. The funds can be used for both capital and operating expenditures, and the special nature of the Act allows the basis of taxation to be the development density or impact of a property as well as its assessed value. The Act also allows

debt financing without referendum since a majority of the property owners (who must own at least 75% of the properties by value) must request the CID designation. A plus for the City is that debts of a CID are not debts of the government and do not affect the City's debt limit, while the CID can enjoy a lower interest rate due to its quasi-governmental structure.

Urban Enterprise Zone. Under an Urban Enterprise Zone, specific areas are delineated where deteriorating physical or market conditions have resulted in little or no investment in property improvements or development. Within an Urban Enterprise Zone, if a property owner renovates or develops a site, the City's property taxes can be frozen at the pre-improvement level for a specified time period, then rising in annual steps to full value taxation at the end of the period. This approach is useful in encouraging investment that would otherwise not occur, and in eventually increasing the tax base where taxes would otherwise continue to fall through depreciation.

Urban Enterprise Zones can be set up through State legislation for commercial, industrial or housing investment, but should be used only where development would not otherwise occur.

Tax Increment Financing. This approach allows property taxes to rise as sites are developed or improved, but directs all or some of the increase over and above the pre-improvement tax level into public facilities that have been built to support the area's revitalization. In effect, the government takes the risk through provision of public improvements up front, and then pays itself back through the higher tax collection increment while assuring that the pre-improvement tax collections continue to go into the general fund. Once the improvements are paid for, all of the taxes will go into the general fund. This approach can be very useful in a carefully controlled revitalization effort for a deteriorating area, where future renovations and development can be reasonably anticipated but are dependent on a general improvement to the area.

Development Impact Fees. Fair and reasonable development impact fees can be a useful tool in encouraging economic development when the development community recognizes that adequate public facilities are important to attracting buyers and tenants to their developments. This maintains the long-range health of the community and therefore the continued ability of development to be a profitable enterprise.

